

BPM v7.5 – Process Portal

Lab Exercise



Lab Number 3

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Lab 3 Process Portal Lab/Demo

You will explore some of the features of the IBM BPM Process Portal while some other features would be demonstrated to you.

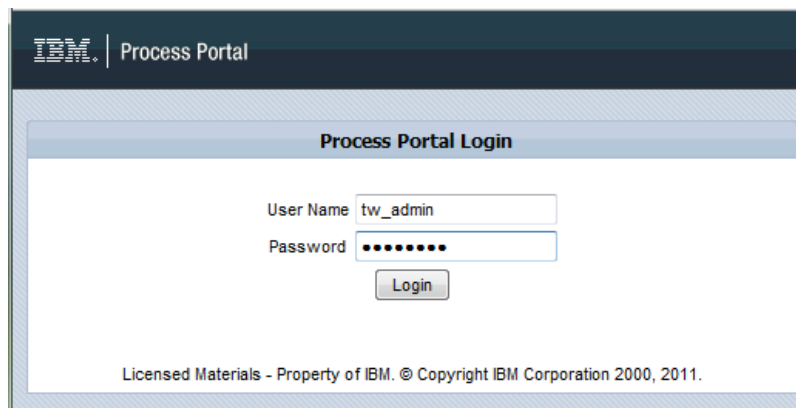
1.1 Bring up the Process Portal

In this section, you will explore the IBM BPM Process Portal functionality, **My Tasks**, which is available to all users of a process application. We will use a pre-built process, Order Fulfillment, which has some historical data.

You will log in to the Process Portal, explore some of its features, view process context of an instance, create a new process instance, view the history of your work, work with help requests that other process participants made to you, and see any process alerts.

1.1.1 Login to the Process Portal

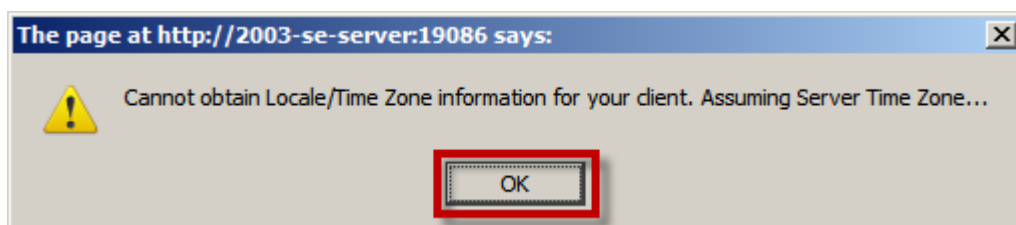
- __1. Start → Programs → IBM → BPM Advanced 7.5 → Profiles → ProcCtr01 → Process Portal
 - __a. Log in using the User Name **tw_admin** and Password **tw_admin**, then click **Login**



Alternatively, you could have opened your browser and pointed to the appropriate URL, such as: `http://[host_name]:[port]/portal`

The default port is 9080.

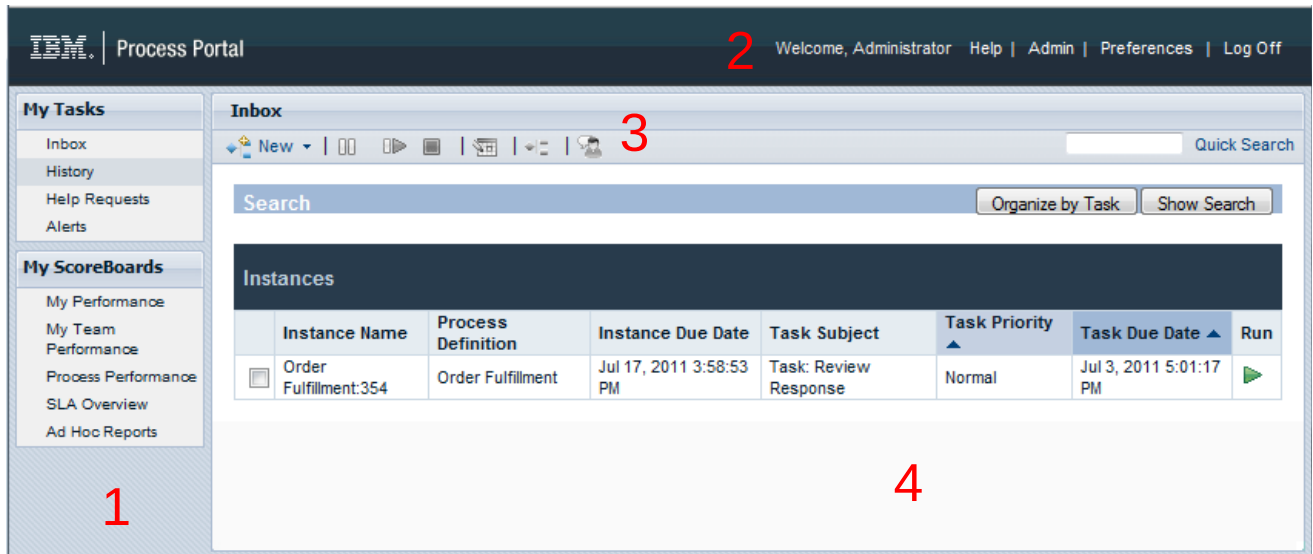
If you are using a VMWare you may notice this time zone message. Just click **OK** and continue with the lab.



1.2 Explore the Process Portal

1.2.1 Explore the IBM BPM Process Portal

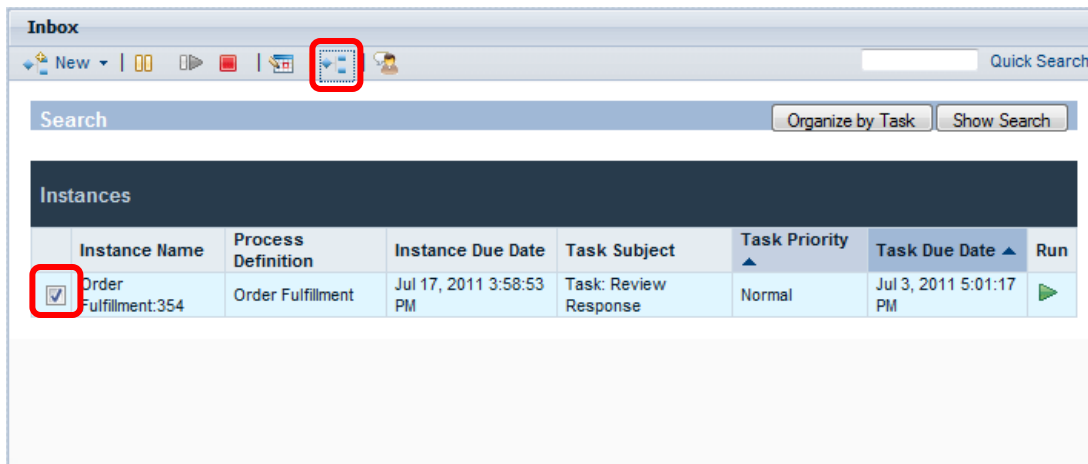
__2. Explore features available in the Process Portal:



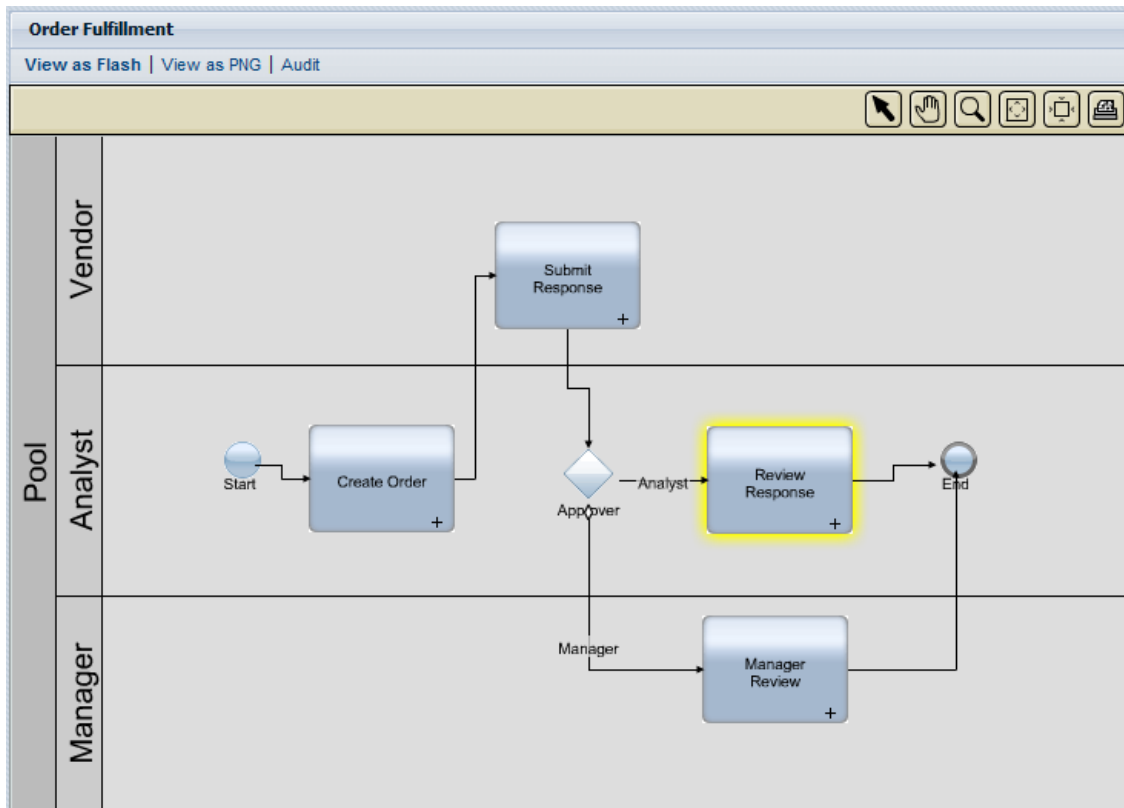
Section	Description
1	You can use the links in the navigation bar to navigate to activities within My Tasks, My Scoreboards, and My Projects. • My Tasks - Receive and complete tasks that are assigned to you, view task execution history, requests for help from other process participants, and process-related alerts. • My ScoreBoards - Monitor individual and process performance, view custom reports, and create ad hoc reports. The team performance and some of these reports are only available to managers. • My Projects - Access custom Process Portal pages that may be defined for a process application. In this example, none are defined.
2	This area displays the name of the current Process Portal user. Click Preferences to specify your email and language settings. Click Help to open the online user assistance for IBM BPM Process Portal.
3	Use the toolbar icons to manage process instances and tasks. For example, you can start, suspend, resume, or terminate currently active process instances, assign tasks to users or groups, change the due date of a process instance or a task, and search for process instances and tasks.
4	This is the main area that displays the items you are currently working with. For example, the preceding image shows the tasks in the current user's Inbox. The tasks are displayed according to the process instance that generated each task. You can click an Instance Name or Task Subject to see more detailed information about each task. In this area, you can also view and sort search results, view reports and scoreboards, and edit preferences.

1.2.2 View process context of an instance

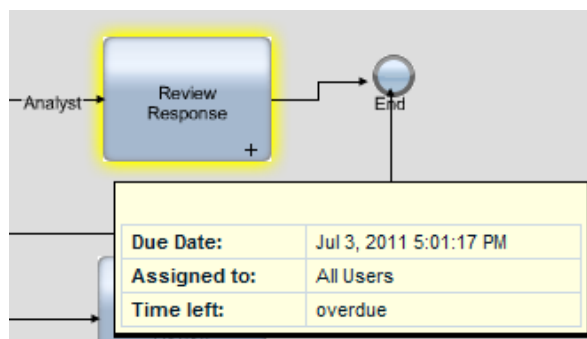
- ___3. The following steps show you how to see a graphic view of an in-flight process. This is called the *process context*.
 - ___a. Select an instance by checking the box next to **Instance Name**, then click the **process diagram** ()



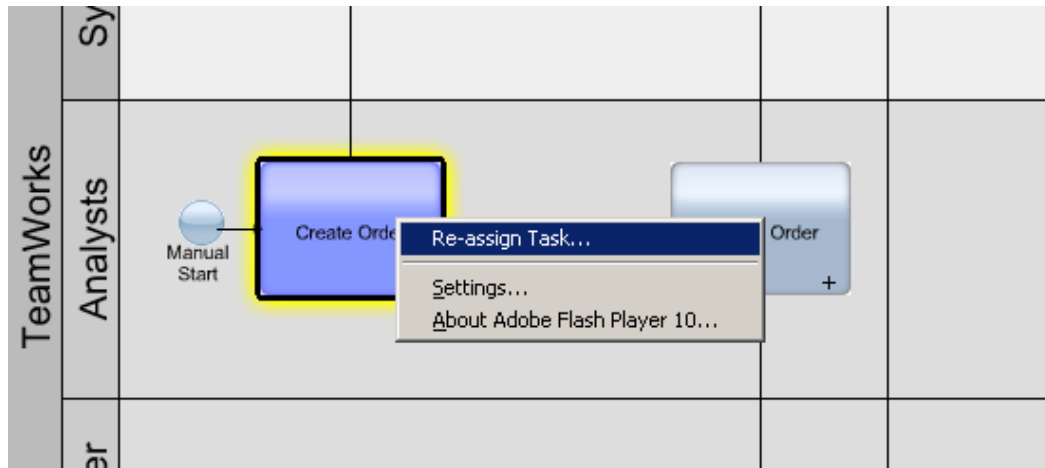
The process diagram will open and if it is an active instance, the current step of the process will be highlighted in a yellow halo. This diagram is not just a static picture, you can also do some work on the current activity such as Re-assigning a task to another user or group, or seeing the Due date of the task, who is it assigned to, and the time left to complete the task.



- __b. View the due date of the task, who the task is assigned to, and the time left to complete the task by clicking on the highlighted task (or hovering over it). In a few seconds the details will appear.



- __c. Try re-assigning a task to another user or group by **right-clicking** the task, then select **Re-assign Task...**

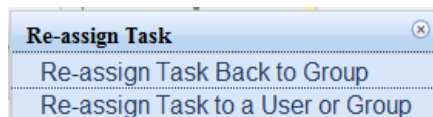


Re-assigning Task from process diagram

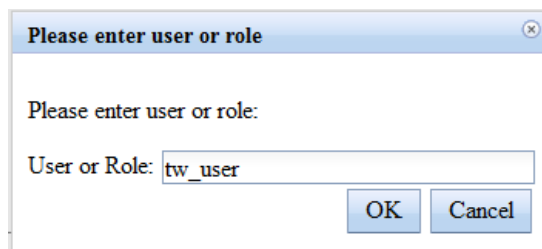
The original task was open to All Users, so re-assigning to a particular role will not be very evident.

You may want to create a process instance and assign the tasks to a certain user to preview re-assignment.

- __i. Select **Re-assign Task to a User or Group**



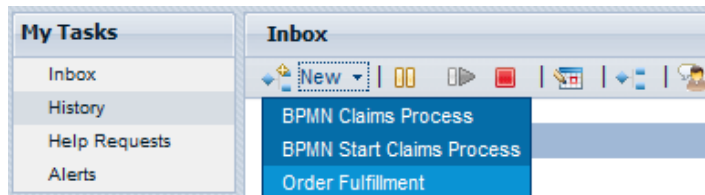
- __ii. At the prompt, enter another user or role name. We entered **tw_user**. Then click **Submit**.



- __iii. Close the process diagram browser pop-up window.

1.2.3 Create a new process instance

- ___4. Create a new process instance. For this example, members of the Analysts team can create new process instances in the Order Fulfillment process application. Who can start a process is defined in each BPD.
 - ___a. In the Inbox, click **New** and a list of processes this user can start will show up. In this case, there is only one, Order Fulfillment. Select **Order Fulfillment**.



- ___b. The Coach (user interface) for the first activity will appear and in a wizard-like fashion you will be guided through the steps of creating a process instance.
- ___c. In the Create Order screen, enter the values in the fields, then click **Next >>**

The screenshot shows a 'Create Order' form. It has a title bar 'Create Order' and a sub-header 'Order'. The form contains several input fields: 'Customer' (text box with 'Acme'), 'Material Desc' (text box with 'Pencil Sharpners'), 'Total Qty' (text box with '100'), 'Issue Date' (text box with 'Jul 16, 2011'), 'Priority' (dropdown menu with 'Low' selected), and 'Quote Deadline Date' (calendar icon with '7/18/2011' selected). There is also a 'Planner Comments' text area. At the bottom right is a 'Next >>' button.

- ___d. Review the order details and click **Submit**. Note, if you wanted to change anything you could click the **<< Back** button.

The screenshot shows a 'Review Order' form. It has a title bar 'Review Order' and a sub-header 'Order'. The form displays the same order details as the 'Create Order' form: 'Customer: Acme', 'Material Desc: Pencil Sharpners', 'Total Qty: 100', 'Issue Date: Jul 16, 2011', 'Priority: 3', and 'Quote Deadline Date: Jul 18, 2011'. There is also a 'Planner Comments' text area. At the bottom right are two buttons: '<< Back' and 'Submit'.

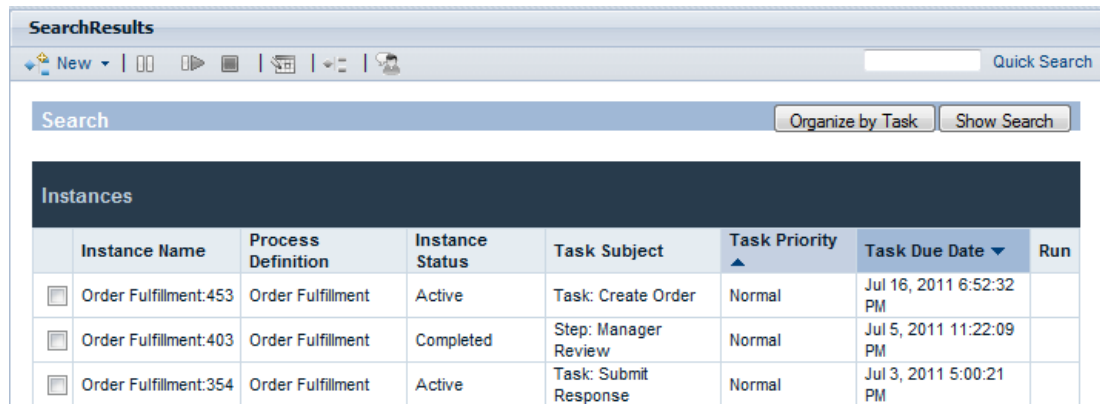
1.2.4 History of your work

- __5. A history of work you have completed is available from the Process Portal under History.
- __a. Under **My Tasks**, click **History** and you will see a list of tasks you have completed sorted by earliest Task Due Date

The screenshot displays the IBM BPM 7.5 Process Portal interface. On the left, the 'My Tasks' sidebar is visible, with the 'History' option highlighted. Below it, the 'My ScoreBoards' section lists various performance metrics. The main content area is titled 'History' and features a search bar and a table of task instances.

Instances							
	Instance Name	Process Definition	Instance Status	Task Subject	Task Priority	Task Due Date	Run
☐	InvalidRequisition:203	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 6:45:45 PM	
☐	InvalidRequisition:204	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:04:37 PM	
☐	InvalidRequisition:205	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:06:10 PM	
☐	InvalidRequisition:206	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:07:44 PM	
☐	InvalidRequisition:207	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:08:20 PM	
☐	InvalidRequisition:208	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:10:01 PM	
☐	InvalidRequisition:209	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:12:12 PM	
☐	InvalidRequisition:210	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jun 30, 2011 7:13:07 PM	
☐	InvalidRequisition:253	InvalidRequisition	Completed	Task: Fix Requisition	Normal	Jul 1, 2011 1:51:11 AM	
☐	Order Fulfillment:303	Order Fulfillment	Completed	Step: Create Order	Normal	Jul 2, 2011 9:02:05 PM	
☐	Order Fulfillment:304	Order Fulfillment	Completed	Step: Create Order	Normal	Jul 2, 2011 9:02:19 PM	
☐	Order Fulfillment:353	Order Fulfillment	Completed	Task: Create Order	Normal	Jul 3, 2011 3:50:41 PM	
☐	Order Fulfillment:354	Order Fulfillment	Active	Task: Create Order	Normal	Jul 3, 2011 4:58:53 PM	
☐	Order Fulfillment:403	Order Fulfillment	Completed	Task: Create Order	Normal	Jul 5, 2011 11:13:45 PM	
☐	Order Fulfillment:453	Order Fulfillment	Active	Task: Create Order	Normal	Jul 16, 2011 6:52:32 PM	

- ___b. To see the task you completed, re-sort the list to make the task with the latest due date show up first by clicking (▲) under **Task Due Date**. The Order Fulfillment instance you just created should now show up as the first task. You could select it and view the process state or click on its Instance Name and see more details about the task.



SearchResults							
Search							
Instances							
	Instance Name	Process Definition	Instance Status	Task Subject	Task Priority ▲	Task Due Date ▼	Run
☐	Order Fulfillment:453	Order Fulfillment	Active	Task: Create Order	Normal	Jul 16, 2011 6:52:32 PM	
☐	Order Fulfillment:403	Order Fulfillment	Completed	Step: Manager Review	Normal	Jul 5, 2011 11:22:09 PM	
☐	Order Fulfillment:354	Order Fulfillment	Active	Task: Submit Response	Normal	Jul 3, 2011 5:00:21 PM	

- ___c. **Log Off** from the IBM BPM Process Portal

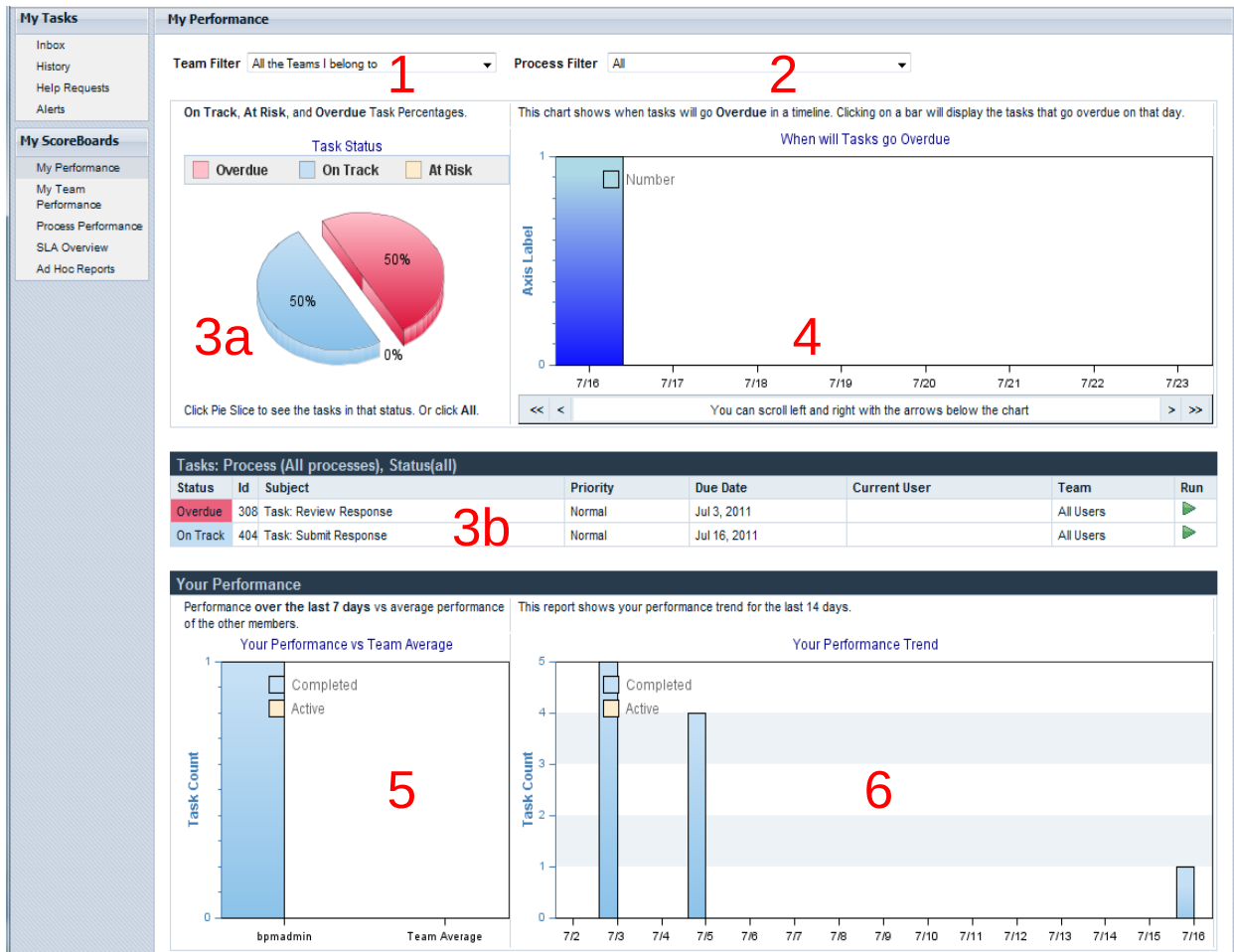
1.3 My Scoreboards for non-managers

In this section, you will use out-of-the-box scoreboards available to all users: **My Performance**, **My Team Performance**, and **Process Performance**. These scoreboards and performance metrics are captured in the performance data warehouse.

1.3.1 My Performance

- ___6. Explore **My Performance**, which is an out-of-the-box scoreboard available to all users. This scoreboard has metrics about your performance.

- ___7. Click **My Performance**, which is under **My Scoreboards**. This shows a list of all your tasks, due dates, your performance versus your team average, and your performance trend:

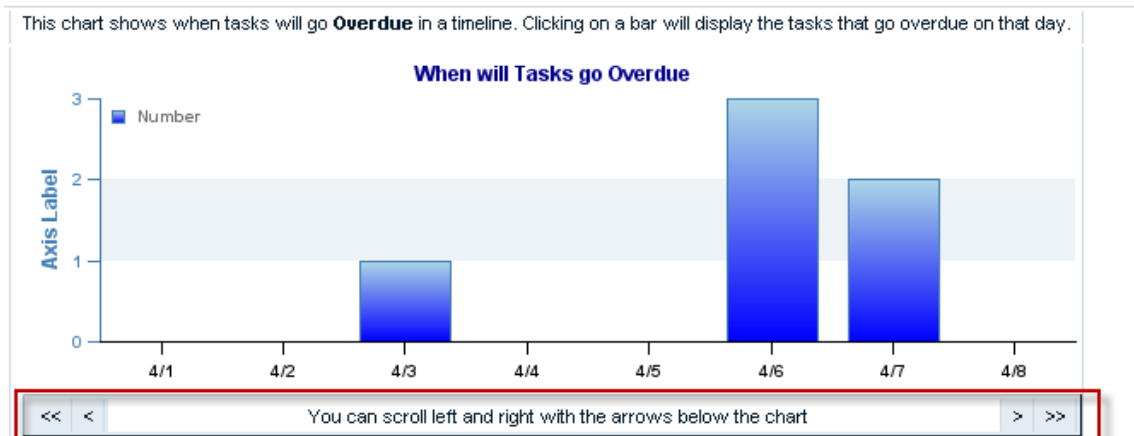


Section	Description
1	You can filter your tasks by teams you belong to using this drop-down.
2	You can filter your tasks by process using this drop-down. For example, a call center representative might have several processes to work on.
3a, 3b	By default all tasks in 3a are categorized into: on track, at risk, and overdue. If you click on one of the categories, for example, overdue, then 3b will refresh and only show overdue task. This shows that these are dynamic scoreboards getting their data from the performance data warehouse.
4	Use the scroll left and right arrows to see when tasks will go overdue.
5	This shows your performance versus your team average over the last seven days.
6	This shows your performance trend for Completed and Active tasks.

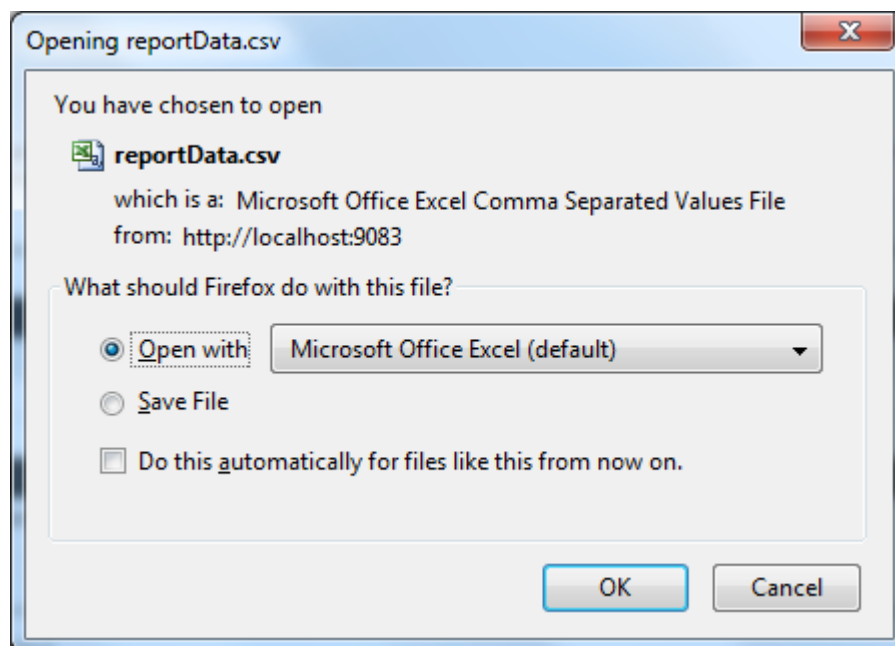
- ___a. Filter the task list to only show overdue tasks by clicking on the pie slice for overdue. Note that the task list gets refreshed and only shows overdue tasks.

Tasks: Process (All processes), Status(Overdue)							
Status	Id	Subject	Priority	Due Date	Current User	Team	Run
Overdue	308	Task: Review Response	Normal	Jul 3, 2011		All Users	

- ___b. Use the scroll left and right arrows to see when tasks will go overdue



- ___c. Export the task list by clicking on the **Export** button.
- ___i. Follow the prompt to open the .csv file with an application (for example, Excel). Alternatively, you could have selected to save the *reportData.csv* file to your file system.



- ___d. Examine the data in the .csv file. It has four data sets for the four graphs you get out-of-the-box. Note that if you opened this file up in Microsoft Excel, the same charts from the Process Portal would be created for you.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2																
3		Overdue	On Track	At Risk												
4	values	1	1	0												
5																
6																
7		16-Jul	17-Jul	18-Jul	19-Jul	20-Jul	21-Jul	22-Jul	23-Jul							
8	Number	1	0	0	0	0	0	0	0							
9																
10																
11		bpmadmin Team Average														
12	Completed	1	0.00E+00													
13	Active	0	0.00E+00													
14																
15																
16		2-Jul	3-Jul	4-Jul	5-Jul	6-Jul	7-Jul	8-Jul	9-Jul	10-Jul	11-Jul	12-Jul	13-Jul	14-Jul	15-Jul	16-Jul
17	Completed	0	5	0	4	0	0	0	0	0	0	0	0	0	0	1
18	Active	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19																

1.4 My Scoreboards for managers



Demo

The remaining sections in this lab will be demonstrated by the Proof of Technology leader.

In this section, you will use additional scoreboards geared towards managers of a process: **My Team Performance** and **Process Performance**. You will also see how you can perform manager tasks such as **reassigning a task** to another user or group and creating **Ad Hoc reports** using process data stored in the Performance Data Warehouse.

1.4.1 My Team Performance

- ___8. Explore **My Team Performance**, which is a scoreboard available to users that have been defined as managers with a team reporting to them. These scoreboards and performance metrics are captured in the performance data warehouse:

- ___a. Log into the Process Portal as a different user – **ofManager1**. Password is *password*.

- ___b. Click on **My Team Performance**, which is under **My Scoreboards**. The upper half with the filters and task lists is very similar to My Performance Scoreboard. New areas are areas **1** and **2**, which respectively represent the Task List for all and All processes and Team Performance. In area **1**, you have some manager capabilities such as ability to reassign tasks or change tasks' priority.

My Tasks

- Inbox
- History
- Help Requests
- Alerts

My Scoreboards

- My Performance
- My Team Performance**
- Process Performance
- SLA Overview
- Vendor Quote Perform...
- Ad-Hoc Reports

My Projects

- Manage EPV
- Order Search

My Team Performance

Team Filter: All Process Filter: All

On Track, At Risk, and Overdue Task Percentages. This chart shows when tasks will go Overdue in a timeline. Clicking on bar will display the tasks that go overdue on that day.

Task Status

When will Tasks go Overdue

Click Pie Slice to see the tasks in that status. Or click **All**.

Task List for all and All processes

Status	Id	Subject	Due Date	Priority	Current User	Team
Overdue	194	Response Required, Order 126-Phillips DVD 45R	03/28/2010	Normal	ofVendor4	
Overdue	204	Response Required, Order 141-Blackberry 99R	03/28/2010	Normal	ofVendor1	
Overdue	207	Response Required, Order 141-Blackberry 99R	03/28/2010	Normal	ofVendor4	
Overdue	212	Response Required, Order 150-Blackberry 99R	03/28/2010	Normal	ofVendor3	
Overdue	230	Response Required, Order 149-Garmon 350 GPS	03/28/2010	Normal	ofVendor1	
Overdue	231	Response Required, Order 149-Garmon 350 GPS	03/28/2010	Normal	ofVendor2	
Overdue	233	Response Required, Order 149-Garmon 350 GPS	03/28/2010	Normal	ofVendor4	
Overdue	390	Select Vendor Quote, Order 139-Blackberry 99R	03/28/2010	Normal		of Analysts
At Risk	210	Response Required, Order 150-Blackberry 99R	04/02/2010	Normal	ofVendor1	
At Risk	213	Response Required, Order 150-Blackberry 99R	04/02/2010	Normal	ofVendor4	
At Risk	237	Response Required, Order 156-Blackberry 99R	04/01/2010	Normal	ofVendor4	
At Risk	381	Select Vendor Quote, Order 138-Garmon 350 GPS	04/03/2010	Normal		of Analysts
On Track	111	Order Review Needed: Piston Cover	04/06/2010	Normal	ofAnalyst1	
On Track	142	Order Review Needed: Piston Cover	04/07/2010	Normal	ofAnalyst1	
On Track	191	Response Required, Order 126-Phillips DVD 45R	04/06/2010	Normal	ofVendor2	
On Track	192	Response Required, Order 126-Phillips DVD 45R	04/06/2010	Normal	ofVendor2	
On Track	193	Response Required, Order 126-Phillips DVD 45R	04/06/2010	Normal	ofVendor3	
On Track	205	Response Required, Order 141-Blackberry 99R	04/07/2010	Normal	ofVendor2	
On Track	206	Response Required, Order 141-Blackberry 99R	04/07/2010	Normal	ofVendor3	
On Track	211	Response Required, Order 150-Blackberry 99R	04/06/2010	Normal	ofVendor2	
On Track	232	Response Required, Order 149-Garmon 350 GPS	04/06/2010	Normal	ofVendor3	
On Track	234	Response Required, Order 156-Blackberry 99R	04/06/2010	Normal	ofVendor1	
On Track	235	Response Required, Order 156-Blackberry 99R	04/06/2010	Normal	ofVendor2	
On Track	236	Response Required, Order 156-Blackberry 99R	04/06/2010	Normal	ofVendor3	
On Track	374	Select Vendor Quote, Order 148-Kindle XL 5	04/07/2010	Normal		of Analysts
On Track	386	Select Vendor Quote, Order 140-iPhone 3GS	04/06/2010	Normal		of Analysts
On Track	395	Select Vendor Quote, Order 160-Blackberry 99R	04/06/2010	Normal		of Analysts
On Track	564	Response Required, Order 162-Piston Cover	04/06/2010	Normal	ofVendor2	

Reassign **Change Priority**

Team Performance

This report compares the performance of the users in the selected team and for the selected process.

Team Performance

Task Count

1.4.2 Re-assign a task

- __9. Reassign a task to another user:
 - __a. Change the Process Filter so that only Order Fulfillment process instances show up:
 - __i. Use the Process Filter drop-down to select **Order Fulfillment**
 - __ii. The scoreboards should refresh to only show Order Fulfillment process instances
 - __b. Reassign a task using these steps:
 - __i. **Check** the first **At Risk** task, note the Id (for example, **286**) and the current user that it is assigned to (for example, it is assigned to no one, while the Team is assigned to is **ofAnalysts**)
 - __ii. Click **Reassign**
 - __c. Reassign the task to another user by entering the User Name **ofAnalyst1**, then clicking **Ok**
 - __d. Back in your task list, find the task and you should see it assigned to **ofAnalyst1**.

1.4.3 Process Performance

- __10. As a manager of Order Fulfillment, you now have the rights to view Process Performance for the entire process, not just you and your team members, when you click on **Process Performance** you would see tasks for the entire process.
 - __a. Once you are in **Process Performance**, you can drill into a process application by clicking the process application name, in this case **Order Fulfillment**
 - __b. This view gives a process overview of the Order Fulfillment process application. Some of the areas are static; such as 5 and 6 but 1-4 are all dynamic and give you drill-down capability or different views.

Section	Description
1a, 1b	1a gives a summary of the instance status as a pie chart, with the summary data represented in 1b as a table that has such data as number of active, closed, total instances, etc. If in 1a , you clicked on View All, areas 3-6 would be replaced with an Instance List for this process.
2	This is a graph on the Instance Closed / Total Trend in Days, which is the default time-period. You can change the time-period from Days, to Weeks, or to Months. Use the scroll left and scroll-right to view different time periods.
3	If any SLAs were defined for a process application, you would see them here.
4	If any Timing Intervals were defined for a process application, you would see them here.
5	This is an Activity Task Count that shows for each process activity, the number of tasks that are Overdue, at Risk, and on Track.
6	This graph shows the Average Historical Duration for each process activity.

- ___c. Under the Instance Status pie-chart, click on **View All** and the Instance List will appear

1.4.4 Custom Reports

- ___11. If a process application had any custom reports and scoreboards, these could be exposed in the Process Portal. Let's take a look at what a custom report might look like for Order Fulfillment.

- ___a. Under **My Scoreboards**, click on **Vendor Quote Performance**

1.5 My Projects

In this section, you will work with specific projects that have been exposed to you as a user or group of users. These are custom projects and are not out-of-the-box offerings in the IBM BPM Process Portal. Specifically you will see how you can manage **Exposed Process Values** (EPVs) and perform custom searches. EPVs allow you to add dynamicity of values without redeploying a process. As an example of a custom search, you will work with a search specific to Order Fulfillment: Order Search.

1.5.1 Manage EPVs

Exposed Process Values (EPVs) are a special type of variable that you can create to enable end users to set or alter values while an instance of a process is running. By creating EPVs, you can provide process flexibility. The use of EPVs allows end users to adjust specific variable values as constants, thereby affecting the flow of all running process instances, task assignments, and so on. You can also designate which end users can set or alter EPVs in the Process Admin Console.

This section will show you how you can manage EPVs from the IBM BPM Process Portal.

- __12. In this case, we will work with the EPVs of Order Fulfillment. One of the EPVs of Order Fulfillment is `autoApprovalThreshold`, which can now be used to auto-approve order if the amount is less than a threshold. For ex, 100.00. Different approvers or managers could be giving access to the Process Portal to change this value if needed, without redeploying the entire process application.
 - __a. Under **My Projects**, click **Manage EPV**. A list of EPVs will be displayed. Click **Edit** for **autoApprovalThreshold**
 - __b. A screen that enables you to set a new value for the given EPV and when this value will be effective will appear. We aren't going to change the value at this time, so just click << **Back**

You can create an EPV and show how these can be used in a BPD to control process flow. For example, the `autoApprovalThreshold` EPV you just looked at could be used in a decision gateway to determine which branch is followed. Orders below the `autoApprovalThreshold` EPV would be automatically approved, while the ones over and above the threshold would be sent to manager approval. This EPV can be changed in the Process Portal; therefore you can change the value without redeploying the process.

1.5.2 Predefined searches

Predefined searches for a process application can be exposed in the IBM BPM Process Portal. These predefined searches could be custom built using standard Coaches and integration services, and then exposed to the Process Portal.

- __13. We will work with **Order Search**, which is a predefined (custom) search for Order Fulfillment.
 - __a. Under **My Projects**, click **Order Search**. A Search Filter section allows you to use different filters (search criteria) to find specific instances meeting the selected criteria.
 - __b. Set the Vendor to **Acme** and select the **East** Sales Division, then click **Search**

- ___c. In the updated Search Results, note the Sales Division is East, Vendor is Acme and there are N results meeting the criteria. Other capabilities that you might expect are also available: Export the search results, see the Instance Details and an instance's process diagram.

- ___d. **Log Off** the Process Portal

1.6 Summary

In this lab, you were exposed to some of the capabilities available within the IBM BPM Process Portal.